



salesforce

Scale your customer engagement with AI-driven solutions

KPMG LLP offerings enabled by new AI agents from Salesforce help to escalate efficiency and customer satisfaction





Just when you think artificial intelligence can't move any faster, it does.

Salesforce just announced a groundbreaking suite of autonomous AI agents—appropriately called Agentforce—that can help transform customer engagement. Agentforce augments employees and handles tasks in service, sales, marketing, commerce, and more. It aims to drive unprecedented efficiency and customer satisfaction by enabling organizations to scale their workforces on demand in response to customer needs.

A recent survey found that 44% of organizations have progressed past the research, experimentation and planning phases and are scaling generative AI (GenAI) with a focus on enterprise-wide adoption, optimization and measurable outputs.*

AI agents are intelligent systems that can understand and respond without human intervention. They rely on machine learning and natural language processing to handle a wide range of tasks, from answering simple questions to resolving complex issues—even multitasking. Most important, AI agents can continuously improve their own performance through self-learning. This is distinct from traditional AI, which requires human input for specific tasks.

AI agents can vary in complexity, from simple chatbots to advanced AI assistants. They can be reactive, meaning they respond to changes in their environment, or proactive, meaning they take initiative to perform tasks.

Agentforce's scalable digital workforce of AI agents can analyze data, make decisions, and take action on tasks like answering customer service inquiries, qualifying sales leads, and optimizing marketing campaigns. But Salesforce's AI agents are not limited only to customer relationship management functions. With Agentforce, any organization can easily build, customize, and deploy its own agents for any use case across any industry.

How to make it happen

At the heart of Agentforce is the Salesforce Data Cloud, which equips Agentforce and every Salesforce app to deliver seamless, AI-powered experiences across every touchpoint. Data Cloud unifies and harmonizes all customer data and metadata across systems in real time, enabling Agentforce to operate with context and precision.

Data Cloud helps improve the investment many organizations have already made in data lakes by providing “zero copy” integration with Salesforce. This capability gives applications access to different external databases without the need to move, copy, or reformat any of that data. Agentforce can quickly and easily retrieve enterprise data and then analyze and act on it.

As tantalizing as these capabilities appear, however, organizations must deal with several significant issues first. Clients turn to KPMG for help on these challenges:



The biggest challenge: data

Data acquisition, processing, and cleansing are huge issues. Is your data available in a digital form you can use? Is it centrally located and if not, is it still available for AI agents to work on? Whatever the situation, the data itself is likely to be the biggest challenge.



Define what to measure

Once you have the data, you must determine the key metrics and insights you want to access and measure based on how you’re using the data—whether for sales, marketing, or client-serving roles, for example. After defining these signals, you must direct the AI and other analytics to acquire the right information from the raw data.



Connect to raw data sources

Integration can be hard when different data structures are involved, especially legacy or proprietary systems.



Make the data useful

It’s critical to match the data to the different workflows and roles in an organization. For example, marketers, sales professionals, territory managers, and customer service representatives need relevant data for their specific jobs, which requires an in-depth understanding of what their roles entail.



Aim for transformation, not piecemeal progress

You’ll only achieve incremental gains if you retrofit AI into existing processes. You need to start with AI agents first, then bring in humans at high-value touchpoints. Such a major transformation also requires major change management.

We always say it’s not a package, it’s a patient. And increasingly that means having the best, most personal, most intelligent, most relevant digital experiences. Agentic AI, to us, is the answer to how that gets done.

– Ellery Fisher, SVP, CIO, McKesson Medical Surgery

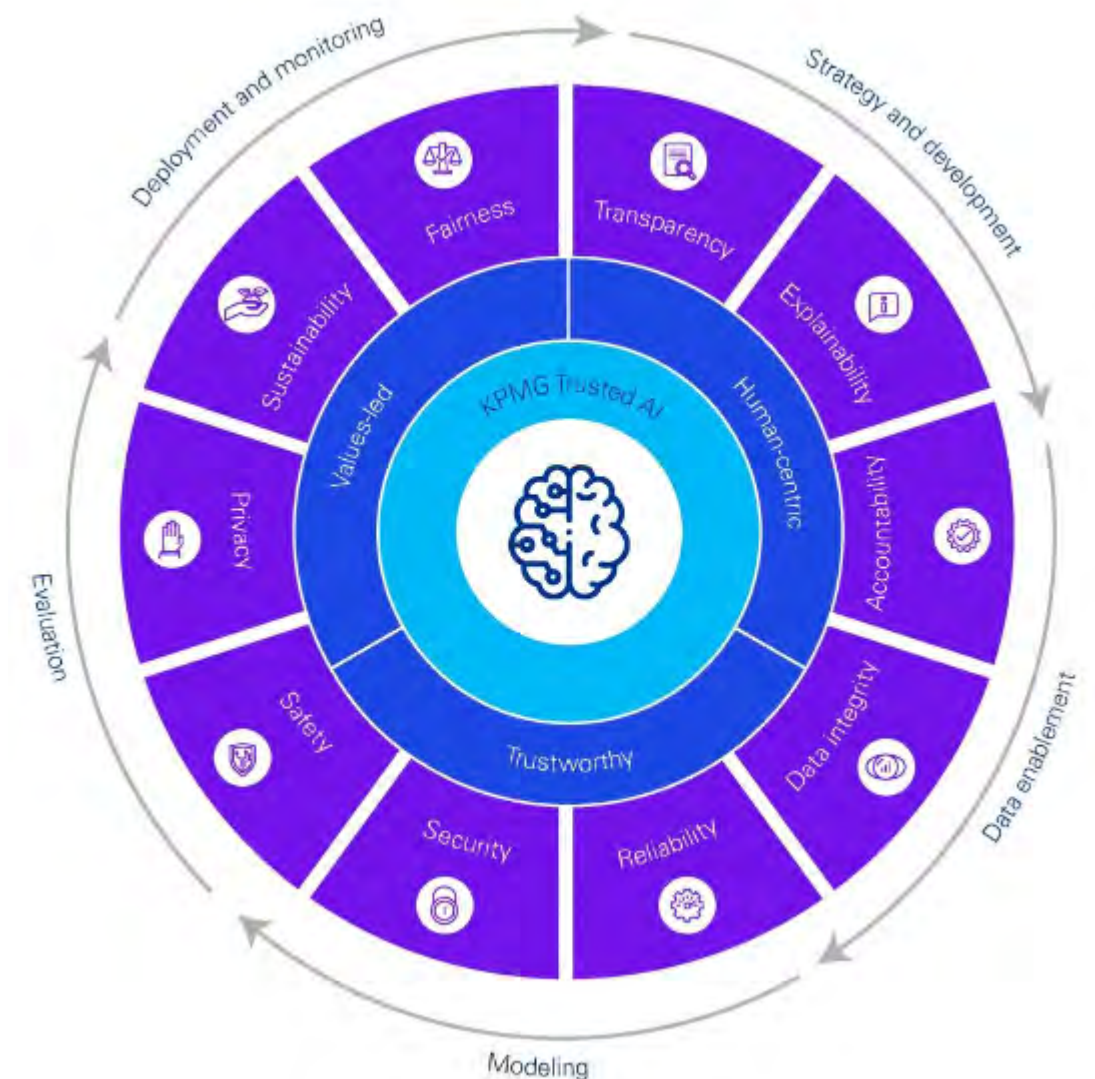
How to secure trust

Of course, all these initiatives mean little if clients and their customers don't trust AI. After all, Agentforce operates autonomously, like a self-driving car. It works independently, adapting to changing conditions using real-time data. When desired, Agentforce also seamlessly hands off to human employees with a summary of the interaction, an overview of the customer's details, and recommendations for what to do next.

How can you be confident that the agent is minimizing incorrect or misleading information, called hallucinations? That it's giving the right answers? How do you monitor and test for that? What governance tools should be in place?

That's where trusted frameworks come in. Salesforce expects its people to be responsible, accountable, transparent, empowering, and inclusive when dealing with AI. In lockstep with Salesforce, KPMG developed a trusted AI framework that embeds trust at every step of the AI lifecycle. We apply this framework to help clients develop their trusted AI programs while also applying it to our own AI strategy. Our approach to trusted AI rests on 10 ethical pillars so that we can deploy the technology in a way that is responsible, trustworthy, safe, and free from bias.

KPMG Trusted AI Framework



Importantly, we prioritize human impact as we deploy AI and recognize the needs of our clients and our people. We are embracing this technology to empower and augment human capabilities—to unleash creativity and improve productivity in a way that allows people to reimagine how they spend their days.



How to achieve business value

Even when you have the right data, governance, and trust frameworks in place, the questions of cost, timeliness, and organizational impact still remain. Should you overcome any issues at once or should you achieve business value one step at a time?

From our experience, we tell our clients three things:

You don't have to upend your existing investments to harness the power of AI.

We can help clients integrate elements of Agentforce from Salesforce and any other platforms they have. As necessary, clients can make stepping-stone investments to gain the benefits faster, paying back the expenditures as they go along when they unlock business value.

You don't have to move your data from one platform to another.

Zero copy partners can easily connect Salesforce to external data platforms, keeping a holistic customer view without the hassle of duplicating data and managing other datasets.

You can still keep the human in the loop. The workforce of the future does not resemble a sea of machines in a bone-chilling server room. It is human beings working alongside machines as teammates. Jobs may be reconfigured and redesigned, causing job dislocations and requiring employees to learn new skills. But underlying this scenario is a compelling future: AI agents can spur a growth in jobs overall and enhance human skills and expertise. Ultimately, they can make every employee an innovator and transform the enterprise into an engine of unconstrained innovation.

How to lead

We're not just helping organizations keep up with today's AI demands—we're helping them lead the charge. We recently announced a minority equity investment in Ema, an agentic AI startup building universal AI employees. This move is part of our overall strategy to lead in the emerging AI agent space, where goal-driven AI systems autonomously plan, coordinate, and execute actions under human supervision.



We are also among the first strategic alliances to work with Agentforce in developing industry-focused incubators. The KPMG AI incubator for Salesforce Agentforce will serve as a center to develop assets and offerings, provide pre-sales support, and create customer demand. This innovation lab offers a hands-on experience to help clients determine their readiness to leverage Agentforce capabilities.

Using the incubator, organizations can test their AI strategies from concept through prototype and implementation. This interactive experience will help clients better understand what Agentforce can bring to their business and how they can apply this new tool, as well as help them define and prioritize use cases.

With the industry leadership from KPMG and Salesforce's innovative technology, we are poised to bring Agentforce to life quickly for our clients. We are eager to empower enterprises across industries to unlock the full potential of Agentforce in the evolving AI landscape.

— Matt DeTroia, SVP,
Alliances & Channel, Salesforce

Looking ahead

As business leaders look to drive outcomes with AI, increase ROI and cement their competitive advantage, we are integrating AI agents across every workflow to help deliver immediate impact and scalability. Together with our alliance partner Salesforce, we are committed to solutions that amplify human potential, streamline operations, and reimagine service delivery.



salesforce

Contact us

Connect with one of our team members to learn more.

Matthew Fidler
Principal, Salesforce Global Platform
Leader, KPMG LLP
E: matthewrfidler@kpmg.com

Wesley Foster
Senior Director
Salesforce Solution Relations
KPMG LLP
E: wesleyfoster@kpmg.com

Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.

¹ “KPMG AI Quarterly Pulse Survey: High hopes, high hurdles, and the pursuit of realizing value in 2025.” 2025. n=100 U.S.-based C-suite and business leaders representing organizations with an annual revenue of \$1 billion or more.

© 2025 KPMG LLP, a Delaware limited liability partnership and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

The KPMG name and logo are trademarks used under license by the independent member firms of the KPMG global organization.

The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act upon such information without appropriate professional advice after a thorough examination of the particular situation. USCS026408